

Microsoft Dynamics CRM Online

Service Description

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Introduction

Microsoft Dynamics CRM Online is a Microsoft-hosted solution that delivers the simplicity and flexibility of cloud computing with powerful customer relationship management (CRM) capabilities, and the familiarity of Microsoft Office. Microsoft Dynamics CRM Online includes modules for sales force automation, marketing automation, and customer service and support. With the service, businesses gain instant online access to CRM capabilities anywhere over the web. Microsoft Dynamics CRM Online is available in 42 markets and 41 languages worldwide. The service is hosted in highly secure, Microsoft-owned and managed data centers and provides a 99.9 percent financially-backed uptime service level agreement (SLA).

This document provides business professionals with an overview of the capabilities of the Microsoft Dynamics CRM Online service.

Why Microsoft Dynamics CRM Online?

Microsoft Dynamics CRM delivers access to customer information through the familiar Microsoft Outlook experience, ensuring rapid user adoption and realization of business results. With Microsoft Dynamics CRM Online, you get this powerful CRM software delivered as a cloud service from Microsoft, enabling business agility, predictable pay-as-you-go pricing, and a financially backed SLA. Microsoft Dynamics CRM Online empowers users, helping to create teams that are:

- **Highly productive.** Natural and familiar experiences allow users to focus their time on the task at hand.
- **Prepared and insightful.** Relevant and actionable insight helps team members move their job forward.
- **Collaborative and connected.** Innovative social tools and unified communications help teams work together for successful outcomes.

Enable your sales force to spend more time selling

Microsoft Dynamics CRM Online enables sales organizations to take advantage of full lead to cash visibility, lead and opportunity tracking, streamlined approvals, and real-time sales forecasts to drive increased sales output and higher close rates.

Improve customer satisfaction

Microsoft Dynamics CRM Online helps customer service organizations provide compelling experiences that help contain service costs, while also building customer loyalty by empowering users with tools that:

- Simplify case management
- Streamline escalations
- Improve knowledge sharing
- Enable more effective account management

Improve marketing effectiveness

With Microsoft Dynamics CRM Online, marketing professionals can improve their marketing effectiveness by using:

- Flexible segmentation tools
- Simplified campaign management capabilities
- Intuitive response tracking
- Insightful analytics

Optimize the value of your relationships

Microsoft Dynamics CRM Online lets organizations apply the inherent flexibility and extensibility of Microsoft Dynamics CRM to maximize the value of all relationships by quickly creating custom business applications and industry solutions without compromising on capabilities, budget, or delivery time.

Features of Microsoft Online Services

Microsoft Dynamics CRM Online is one of several cloud services offered by Microsoft. These Internet-based services are designed to help meet the need for robust security, all-the-time reliability, and user productivity.

Each service is designed for reliability, availability, and performance with a financially backed SLA for a 99.9 percent scheduled uptime. Microsoft deploys patches, security updates, and back-end upgrades, helping to eliminate the time and effort organizations spend managing their servers.

Subscribers to Microsoft Dynamics CRM Online benefit from a set of features that are common to all of the Microsoft business-class cloud services:

- **Secure access.** Microsoft online services are accessed through 128-bit Secure Sockets Layer (SSL) or Transport Layer Security (TLS) encryption. Anyone who intercepts a communication sees only encrypted text.
- **Intrusion monitoring.** Microsoft continuously monitors the Microsoft online services systems for any unusual or suspicious activity. If Microsoft detects such activity, it investigates and responds appropriately. In the unlikely event that a significant incident occurs, the customer is notified.
- **Security audits.** Microsoft regularly assesses the Microsoft online services infrastructure to ensure that the latest antivirus signatures and required security updates are installed, and that high-level configuration settings are in compliance with Microsoft security policies. For details, refer to the [Microsoft Dynamics CRM Online Security and Service Continuity Guide](#).
- **High availability.** Microsoft online services have a 99.9 percent scheduled uptime. If a customer's service is affected, Microsoft offers financial remedies subject to the terms and conditions of the SLA. For details, refer to the [Service Level Agreement for Microsoft Online Services](#).
- **Service continuity.** Redundant network architecture is hosted at geographically dispersed Microsoft data centers to handle unscheduled service outages. Data centers act as backups for each other: if one fails, the affected customers are connected to another data center with limited interruption of service.
- **Managed Service updates.** CRM Online releases service updates and upgrades to all customers on a frequent basis. The new rapid release cadence for CRM Online allows us to deliver value more frequently to our customers and partners. These can be planned maintenance updates to the service to provide increased stability, reliability and performance. Additionally, CRM Online typically has 2 major service releases each year. CRM Online has a process for notifying admins on certain updates and providing reminders on those updates. In certain cases, the admin can also choose to delay the update. To learn more, please visit [Policies and communications for CRM Online updates](#).
- **Microsoft Online Services portal***. This easy-to-use website is the center for activities related to Microsoft Dynamics CRM Online and other Microsoft online services. The portal provides services based on each organization's specific needs. Prospective subscribers can use the portal to sign up for a free trial. Administrators can manage users, administer services, download tools, and learn about service administration from online help.
- **Integration with Microsoft Services.** CRM Online provides seamless integration to other Microsoft services such as Yammer, Lync, Skype, Office 365, SharePoint, Exchange, Bing maps, and Azure services.

- **Online Admin Center.** This is an intuitive portal that enables administrators to manage instances and preferred solutions. Preferred solutions are third-party packages that can be applied to a CRM instance that are considered “trusted” and are required to undergo a high level of scrutiny prior to including in this system. This portal also provides capabilities to manage “Sandbox” instances. Sandbox instances are non-production instances that developers and customizers can use to code and test new customizations isolated from their production applications. Using this portal, administrators can reset their non-production instances back to factory settings or copy another instance into a non-production instance. They can also put their non-production instance into an administration mode where only administrators and customizers can sign in to the application. Non-production instances can be purchased by a different license from the additional instance add-on in Office 365, which are for production purposes only.
- **Identity Management including single sign-on**.** All Microsoft cloud services today, including CRM Online, rely on the identity management capabilities provided by Windows Azure Active Directory (Windows Azure AD). These capabilities include a cloud based store for directory data and a core set of identity services including user logon processes, authentication and federation services. In addition, organizations that subscribe to these cloud services can configure single sign-on to allow interoperability with their existing on-premises Identity system such as Active Directory. After Federation is configured, all Microsoft online services users whose identities are based on the federated domain can use their existing corporate logon to automatically authenticate to the service. For more information, please refer to the [Office 365 Identity Service Description](#). Dynamics CRM provides capabilities to integrate your active directory environment with third-party identity providers.

**Existing customers may have signed up in the past via a billing platform and subscription management portal other than the online services platform; portals through which these features are unavailable. Microsoft is contacting these customers to procure a short-to-midterm transition to the Microsoft Online Services portal.*

***For how to integrate with your Active Directory environment, please refer to <http://technet.microsoft.com/en-us/library/jj205462.aspx>. For integrating with third-party identity providers, please refer to <http://technet.microsoft.com/en-us/library/jj679342.aspx>.*

Microsoft Dynamics CRM Online Service Features

International availability

Microsoft Dynamics CRM Online is available in Australia, Austria, Belgium, Brazil, Canada, Chile, Colombia, Costa Rica, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong SAR, Hungary, India, Ireland, Israel, Italy, Japan, Korea, Luxembourg, Malaysia, Mexico, Netherlands, New Zealand, Norway, Peru, Poland, Portugal, Puerto Rico, Romania, Russia, Singapore, Spain, Sweden, Switzerland, Trinidad and Tobago, United Kingdom, and United States.

Data center locations

Microsoft Dynamics CRM Online maintains redundant data centers distributed around the world. When a company signs up for Microsoft Dynamics CRM Online, its hosted environment is automatically provisioned in the appropriate data center based on the company's address. All users for the company are hosted from the same data center.

Localization

Microsoft Dynamics CRM Online is offered in the following languages: Arabic, Basque (Basque), , Bulgarian, Chinese (Traditional), Chinese (Simplified), Catalan, Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, Galician, German, Greek, Hebrew, Hindi, Hungarian, Italian, Japanese, Kazakh, Korean, Latvian, Lithuanian, Norwegian, Polish, Portuguese (Brazil), Portuguese (Portugal), Romanian, Russian, Serbian (Latin), Slovak, Slovenian, Spanish, Swedish, Thai, Turkish, and Ukrainian.

The Microsoft Online Services portal supports the following languages: , Chinese (Traditional), Czech, Danish, Dutch, English, Finnish, French, German, Greek, Hungarian, Italian, Japanese, Norwegian, Polish, Portuguese (Brazil), Romanian, Spanish, and Swedish.

Support services

A Microsoft Dynamics CRM Online subscription includes both technical and billing support services, provided by dedicated teams of specialists. Support is provided to people with administrator permissions for their company's Microsoft Dynamics CRM Online service. For more information, see the [Support](#) section of the Microsoft Dynamics CRM Online website.

Service Updates

There are three types of updates that can occur with CRM Online:

1. The first type of update is a customer-driven update. In this case, we have made major updates to the CRM Online Service. CRM Online typically releases two major service releases each year, which provide new features and functionality. We currently use the reschedule update functionality, where you can choose when to schedule your upgrade to the next major release. All customers are updated during the defined service update release period, usually over a three month window.
 - In using the schedule update functionality, we preschedule customers and notify them when they are scheduled for the upgrade. Customers are notified 90 days in advance of a scheduled update and are given the opportunity to change it. We also send additional communications to all CRM Online Administrators at 30 days, 15 days, 7 days, 0 or day of, and post upgrade. More information: [Manage Microsoft Dynamics CRM Online updates](#)

In some cases, we may reach out to customers directly to schedule a date/time for your upgrade to ensure success. Any opt-in updates that have not been applied will need to be applied in order for the CDU update to complete.

2. The second is a product update. With this type of update, you have the option to receive the new features or you can choose to wait and get product updates later, like at the next major release. For product updates, these service updates are typically new capabilities that we are adding to the service. They may or may not impact any custom code you have written, so we always advise testing before upgrading your production instances.
3. The third are minor service updates which are released approximately ten times a year that may contain bug fixes, and performance and system updates for the service. These updates are treated as a planned maintenance when downtime is required. When no downtime is required, we do not send communications.

Subscription plan

Each user who accesses the Microsoft Dynamics CRM Online service directly or indirectly must have an active user subscription license. In addition to the user licenses, customers can also purchase add-ons associated with the Microsoft Dynamics CRM Online subscription plan.

Key features and specifications

An overview of the key features and specifications associated with Microsoft Dynamics CRM Online is provided in the following table.

Feature Area	Feature	Description
Application Components	Custom entities	300 custom entities included
	Processes (including workflows)	Included (200 background workflows included; unlimited for other process categories)
	Storage (pooled)	5 gigabytes (GB) base customer storage
	User access	Online and offline
	Mobility support	Included
Application Administration	Unlimited application troubleshooting	Included
	Patch installations	Included
	Version upgrades	Included
	Data migration tools	Included
Monitoring	Proactive response to alerts	Included
	Port and network device monitoring	Included
	Proactive hardware failure monitoring	Included
	System software monitoring	Included
	Application server monitoring	Included
	Database monitoring	Included
	Backup and recovery	Included
	Security	Included
	Service level agreement	Financially-backed 99.9 percent uptime
Support	Basic support	Included
	Enhanced support	Available for purchase
	Professional direct support	Available for purchase (check market availability)

Integration with Microsoft Services

Service	Benefits	More Info
Yammer	To enhance your organization’s collaboration, use Microsoft Dynamics CRM Online to connect directly to Yammer, a powerful tool for social networking to facilitate collaboration for sales, marketing, and customer service business processes in your company.	More info
Lync	To enhance your organization’s communication with customers, leads, and prospects, use Microsoft Dynamics CRM Online with Lync online to do outbound calls*. You can also collaborate with team members using Lync presence, and chat. With the desktop Lync client, you can also get the rich capabilities of file sharing, conferencing, and video presentations. This communication is also tracked as an activity in CRM.	More info

	*Requires specific Lync online or Office 365 licensing plans.	
Skype	To enhance your organization’s communication with customers, leads, and prospects, use Microsoft Dynamics CRM Online with Skype to do outbound audio and video calls and conference calls. This communication is also tracked as an activity in CRM.	More info
Office365	Through integration of Microsoft Dynamics CRM Online with Microsoft Office 365, Microsoft Dynamics CRM Online customers who are subscribed to Office 365 have single sign-on access through identity federation, to any Office 365 supported application, such as Microsoft Exchange Online. Similarly, when provisioned, Office 365 customers have access to Microsoft Dynamics CRM Online.	More Info
PowerBI	The helps you analyze the data being collected by CRM Online to deliver deeper insights and data visualization to make more informed business decisions.	More info
SharePoint Online	To enhance your organization’s document management and collaboration for sales, marketing, and customer service business processes, use Microsoft Dynamics CRM Online with Sharepoint online to store, find and share documents securely in the context of CRM records.	More info
Exchange Online	To track communication and contact information for customers and prospects, use Microsoft Dynamics CRM Online with Exchange Online by synchronizing emails for users and queues, and by synchronizing appointments, contacts and tasks.	More Info
Azure Extensions	Microsoft Dynamics CRM Online supports integration with Windows Azure. By integrating Microsoft Dynamics CRM with Windows Azure, developers can register plug-ins with Microsoft Dynamics CRM that can pass run-time message data, known as the execution context, to one or more Windows Azure solutions in the cloud. This is especially important for Microsoft Dynamics CRM Online because Windows Azure is one of two supported solutions for communicating run-time context obtained in a plug-in to external line of business (LOB) applications.	More Info
Azure Active Directory	Enables easy sign on to CRM Online, Office 365 and other online services so your users only have to remember one username and password.	More info
Azure Multi-factor Authentication	Provides additional security to protect your data and customer contacts. Offers additional security using smartphone app, text, or phone call to confirm identity.	More info
Azure ServiceBus	Provides a service for queuing messages from the CRMOL system and forwarding them to an external application for action.	More info
Windows Azure Access Control	Provides an easy way to authenticate and authorize users to gain access to your web applications or LOB applications hosted in the cloud.	More info

Bing Maps	Bing can leverage the location attributes of CRM data to provide a wide variety of location-based functionality, including geospatial visualization, finding nearest service agents to jobs, optimizing routes for mobile sales people, analyzing our data in heat maps and thematic maps.	More info
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Plans and Licensing

Microsoft Dynamics CRM Online provides different plans and licensing options to suit the needs of customers. For current pricing information available through the Microsoft Online Services Program, see the [online pricing guide](#).

For an overview of the licensing and support options available, please review the [purchase online guide](#).

Additional data storage

Microsoft Dynamics CRM Online allocates an initial 5 gigabytes (GB) of storage, which is pooled and shared by all service users. Microsoft Dynamics CRM Online subscribers can also purchase additional storage in gigabyte increments for a monthly charge (prices and currency vary based on your location). This storage is shared across the organization (that is, storage is shared across instances) and is not a per-user add-on. An additional 2.5 GB of storage is provided for every 20 professional paid user licenses up to a maximum of 50 GB.

Important: Customers who have purchased Microsoft Dynamics CRM Online directly can add up to a total of 145 GB of additional storage, while customers who have purchased the service via Volume Licensing can add up to a total of 995 GB of additional storage.

Additional instances

Production instances

Microsoft Dynamics CRM Online allocates one production instance with each subscription. CRM Online subscribers also have the option of adding up to 50 additional production instances and up to 10 additional non-production instances for a monthly charge (prices and currency vary based on your location).

Non-production (sandbox) instances*

Changes to production applications must be managed carefully. Direct changes to production without proper development time, evaluation, and testing can undermine the stability of the application and cause downtime that could have been avoided by making these changes elsewhere. The ideal place to develop and test new application changes is in a separate non-production instance in CRM Online. A non-production instance, which is referred to as a sandbox instance, is completely isolated from your production application. It may contain a full or partial copy of production data, users, and customizations. Since changes in a sandbox instance do not affect production, enterprises can build their applications with the confidence that their daily productivity will not be adversely affected.

You can manage sandbox instances via the CRM Online admin center and purchase them via an add-on to your Microsoft Dynamics CRM Online subscription. Customers with more than 25 professional paid user licenses will also receive one free additional sandbox instance.

Processes

Processes enable you to model real-life business processes inside Microsoft Dynamics CRM. There are four categories of processes you can choose from when modeling your business practices:

Workflows

Use this process to model and automate real world business processes, tasks or sets of actions on records in the system. These processes can be configured to run in the background or in real time and can optionally require user input. Customers may create up to 200 custom background workflows; there are no limits for real-time workflows.

Actions

Use this process to create a new operation that is not available in a stock Microsoft Dynamics CRM installation or to combine multiple disparate operations into a single operation. For example, in the case of a support call center, you could combine create, assign, and set state operations into a single new "escalate" operation. There are no limits on the number of custom Actions that you can create in the system.

Business process flows

Use this process to create a visualization of the business process flow. Users are guided through various stages of the sales or customer service processes. At each stage, you complete specific steps and then move to the next stage. You can customize the process flow by adding or removing steps, changing the order stages, or adding new entities to the process flow. There are no limits on the number of custom business process flows that you can create in the system.

Dialogs

Use this process to create an interactive step-by-step data entry form that requires user input to start and run to completion. When you start the dialog process, a wizard interface is presented so you can make appropriate selections or enter data as you progress through each page of the wizard. There are no limits on the number of custom dialogs that you can create in the system.

Custom entities

Microsoft Dynamics CRM Online ships with a number of commonly used entities by default, but customers can create custom entities to address the unique needs of the business solution. Similar to workflows, an entity is a single object and is defined within the product. A set of standard business entities are included in the Microsoft Dynamics CRM Online product; in addition, you may create up to 300 custom entities for each Microsoft Dynamics CRM Online instance.

System requirements and browser support

CRM Online supports a variety of browsers and mobile devices running on Windows.

Supported versions of Browsers

See below for a list of the supported browsers and the versions supported by CRM Online.

Supported versions of Windows and Internet Explorer

Microsoft Dynamics CRM Online is compatible with several of the latest versions of Internet Explorer running on Windows.

More information: [Supported versions of Internet Explorer](#)

Supported non-Internet Explorer browser applications

Microsoft Dynamics CRM Online is compatible with the latest versions of popular web browsers, such as Mozilla Firefox, Google Chrome, and Apple Safari.

More information: [Supported non-Internet Explorer web browsers](#)

Supported versions of Microsoft Office

Microsoft Dynamics CRM Online integrates with several of the latest versions of Microsoft Office.

More information: [Supported versions of Microsoft Office](#)

Microsoft Dynamics CRM mobile device support

Users have several device options, such as mobile phones or tablets, for accessing Microsoft Dynamics CRM data.

Microsoft Dynamics CRM for phones

Both native apps and web browser access are available for popular mobile phones, such as iPhone, Android, and Windows Phone.

More information: [Mobile phone support for Microsoft Dynamics CRM 2013 and Microsoft Dynamics CRM Online](#)

Microsoft Dynamics CRM for tablets

Both native apps and web browser access are available for popular tablets, such as iPad, Android, and Windows 8.

More information: [Tablet support for Microsoft Dynamics CRM 2013 and CRM Online](#)

Service availability

Like all Microsoft online services, Microsoft Dynamics CRM Online has 99.9 percent scheduled uptime with a financially-backed SLA covering any instance when this service availability standard is not met.

Service continuity management

Microsoft Dynamics CRM Online is hosted in Microsoft-managed data centers that are designed to operate highly available online services.

Hardware failures, natural disasters, and human error all have the potential to affect service availability. To address this, Microsoft Dynamics CRM Online offers service continuity management, a process for managing risks to ensure that the Microsoft Dynamics CRM Online infrastructure is capable of continuing service if unexpected events occur. Service continuity management for Microsoft Dynamics CRM Online includes provisions to quickly recover from these events should they occur.

More information: [Microsoft Dynamics CRM Online Security and Service Continuity Guide](#)

Data backup

Data protection services are provided to prevent the loss of Microsoft Dynamics CRM Online data. Backups are performed daily and retained for 90 days.

Microsoft Dynamics CRM Online Capabilities

Microsoft Dynamics CRM Online provides a full range of capabilities for sales force automation, marketing automation, customer service, and social media insight. Microsoft Dynamics CRM is a modern business application engineered with the latest technologies to transform the way you find, win, and retain customers. As an enterprise-ready solution with low total cost of ownership, Microsoft Dynamics CRM delivers a whole new level of business value.

Sales force automation

Buying decisions are often made before you can even engage. To win, sales must adapt quickly. By using solutions that are familiar, intuitive, and easy to adopt they can be more effective in the office or on the go. With CRM Online your sales team has exceptional access to social data for lead generation and relationship management to make every customer conversation more relevant, valuable, and productive. Your sales reps can easily collaborate across teams, geographies, and work groups with instant visibility into their pipeline from anywhere, on any device. For an overview of the sales automation capabilities, please refer to <http://www.microsoft.com/en-us/dynamics/crm-sales.aspx>.

Marketing automation

Today's marketers need the ability to plan, execute, and measure campaigns easily, from start to finish. Microsoft Dynamics Marketing helps engage your customers to bring your marketing vision to life by enabling you to accelerate your marketing around one plan that's as agile as you are. Reduce your time to market, improve brand consistency and message while gaining deep customer insights that help you plan effectively and execute flawlessly. Enterprise-ready collaboration means you work better together—across your team and with other agencies—on brand, content, and events, to stay aligned and agile. For an overview of the marketing automation capabilities, please refer to <http://www.microsoft.com/en-us/dynamics/crm-marketing.aspx>.

Customer service and support

Meet your customers wherever they are and deliver customer service that delights. CRM Online provides a full range of customer service and support capabilities that help to reduce service response times, improve case resolution, and increase customer self-service so you can manage and exceed SLAs. Deliver responsive, relevant, effective service—anywhere, any time, on any device. Connect with your customers on any channel, provide service on their terms, and empower your teams to move quickly to meet today's customer expectations. For an overview of the customer service and support capabilities, please refer to <http://www.microsoft.com/en-us/dynamics/crm-customer-care.aspx>.

Social

Turn sentiment into opportunity with Microsoft Social Listening. Monitor brand presence and track strategic initiatives across marketing, sales, and customer service. Microsoft Dynamics CRM Online provides social capabilities to help organizations to analyze and act on market intelligence from social conversations, connect with their customers more effectively, drive business agility, foster customer loyalty, and accelerate your organization's success with social capabilities. For an overview of the social capabilities, please refer to <http://www.microsoft.com/en-us/dynamics/crm-social.aspx>.

User interface

Microsoft Dynamics CRM Online delivers access to customer information through natural, productive, and insightful experiences, ensuring rapid user adoption and realization of business results.

Reimagined user experience

The new user experience organizes information in a clean, consistent, and easy-to-access manner. By giving you all the information you need at one time, you don't get distracted and you stay on task. The streamlined navigation experience drops down from the top of the screen with a single touch.

Advanced user personalization

Microsoft Dynamics CRM Online enables organizations to configure workspaces that are personalized to meet specific job roles and information needs. Creating a personalized workspace involves setting the default pane and tab that are displayed when users open Microsoft Dynamics CRM Online. Organizations also have control over the number of records displayed in lists, the display format for numbers and dates, and the language presented in the user interface. Combine this personalization with the new dashboard feature to create a personalized dashboard for an organization's default view.

Role-based forms

Microsoft Dynamics CRM Online displays forms based on user roles. This role-tailored design ensures that the business professionals in an organization have fast access to the relevant information they need. Role-based forms also prevent users from viewing data that they are not authorized to view.

Inline data visualization

In Microsoft Dynamics CRM Online, users can quickly create and share inline charts with drill-down intelligence. Using these charts, users can visually navigate data and uncover new insights to contribute to an organization's success. Charts can be viewed from the main list of records or from the list of records associated with an individual record. Charts can be shared with other users or teams in the organization, and charts created by specific users can be imported into other users' records.

Dashboards

Microsoft Dynamics CRM Online provides dashboards that give users easy access to all the important information they need to make key business decisions every day. Assemble and present information from several areas in Microsoft Dynamics CRM Online in an easy-to-read format to limit the need for users to search multiple areas for the required information. Dashboards are easy to create and revise as changing business needs require.

Better Outlook experience

Microsoft Dynamics CRM Online takes full advantage of native Microsoft Office Outlook functionality, such as previews and conditional formatting. Within Outlook, Microsoft Dynamics CRM Online areas display as sub-folders in Outlook mail folders. With a few exceptions, the functionality of Microsoft Dynamics CRM Online for Outlook provides the same level of application functionality as do browser clients.

Configuration, customization, and extensibility

Configuration tools

Microsoft Dynamics CRM Online provides a set of web-based tools that allow customers to configure many aspects of the application, including:

- **Web services.** Create a custom data model to structure and manage your data. You can include this data model in a transportable solution.
- **User interfaces.** Create or modify the forms to see or input relevant data to the system. You can specify which users or teams see a specific form by assigning security roles to them.
- **Views.** Create or modify system views to help people easily apply specific filters to CRM data.
- **Reports.** Create new reports or modify existing Microsoft Dynamics CRM Online reports to customize the way you capture, store, and view data.
- **Business processes.** Create or modify business processes, which are an integral part of any enterprise software application. A business process can be of two types: automated processes (called workflows) that rely solely on communication among applications based on a set of rules, and interactive processes (called dialogs) that rely on users to initiate and run the process, and to make the appropriate decisions during processing.

Customization

Microsoft Dynamics CRM Online is a highly customizable and flexible business application. Your organization can do the bulk of customizations through a set of Microsoft Dynamics CRM web-based tools, so that you will not require custom development. For cases that do require custom development, Microsoft provides a software development kit (SDK) that includes guidance and code samples to allow for further customization of the CRM solution.

You can find the [Microsoft Dynamics CRM SDK](#) on the Microsoft Developer Network (MSDN).

Extensibility

Microsoft Dynamics CRM provides a framework that brings together the best aspects of the application platform approach to custom solution development, offering solution builders a strong foundation on which to build a sustainable, profitable business.

- Microsoft Dynamics CRM enables choice and savings through dynamic, reusable application services. Flowing from the Microsoft Dynamics CRM core, the services can be configured for a variety of application purposes. Non-technical end users can modify applications on their own, driving long-term savings.
- Extended CRM applications are being developed for a multitude of purposes, ranging from client portals that surface numerous back-end applications to sophisticated task management systems for the military.
- Microsoft Dynamics CRM provides a model-driven business application framework, a quality that connects the business owners of a custom solution with its developers in an intuitive, business-oriented fashion.
- Microsoft Dynamics CRM offers the highest level of scalability and performance for on-premises, cloud-based, or hybrid configurations.

Microsoft Dynamics CRM enables gains in the solution builder's competitiveness and profitability through the delivery of custom solutions at a lower cost and faster time cycle than would be available with alternative technologies. The ability to deliver tightly budgeted custom solutions that empower non-technical users furthers the solution builder's role as a trusted, long-term strategic partner.

Microsoft Dynamics CRM provides rapid customizations, dynamic services, and prebuilt functionality:

- Point-and-click customization of data management, workflow, user experience, access and security, analytics, and reporting.
- Ability to deploy customizations either in your data center or in the cloud.
- Application integration based on well-supported industry standards.

Microsoft Dynamics CRM Online administration

To manage the Microsoft Dynamics CRM Online service, an organization delegates a Microsoft Dynamics CRM administrator, who can either be an individual within the organization or a Microsoft partner assigned to serve in this role. Users who have been assigned System Administrator and System Customizer security roles can complete tasks such as the following:

- Set up business units, security roles, and teams to control data access.
- Define territories, sales quotas, and the product catalog.
- Configure queues, contracts, and articles.
- Specify conventions for displaying numbers, currency, dates, times, and calendars.
- Change regional and language options for your organization.
- Customize the user interface.
- Set up record auditing.
- Configure document management with Microsoft SharePoint.
- Create workflows to automate business processes.

More information: [Microsoft Dynamics CRM Online Deployment and Administration Guide](#)